

Agenda

	Topic	Type	Time	Presenter
Finance	OYTD Update	Prepare	10 min	Brian A.
	Finance Staples	Prepare	10 min	Chris L.
	Share of Business Analysis	Inform	10 min	Gabe M.
GTM	BFM Prep: -	Prepare	-	-
A&BS	Weekly Insight: [REDACTED]	Inform	15 min	Monique S.

Upcoming Agenda (9/30) Pending Confirmation

- Finance: Finance Staples
- GTM: -
- A&BS: Weekly Insight - Independents

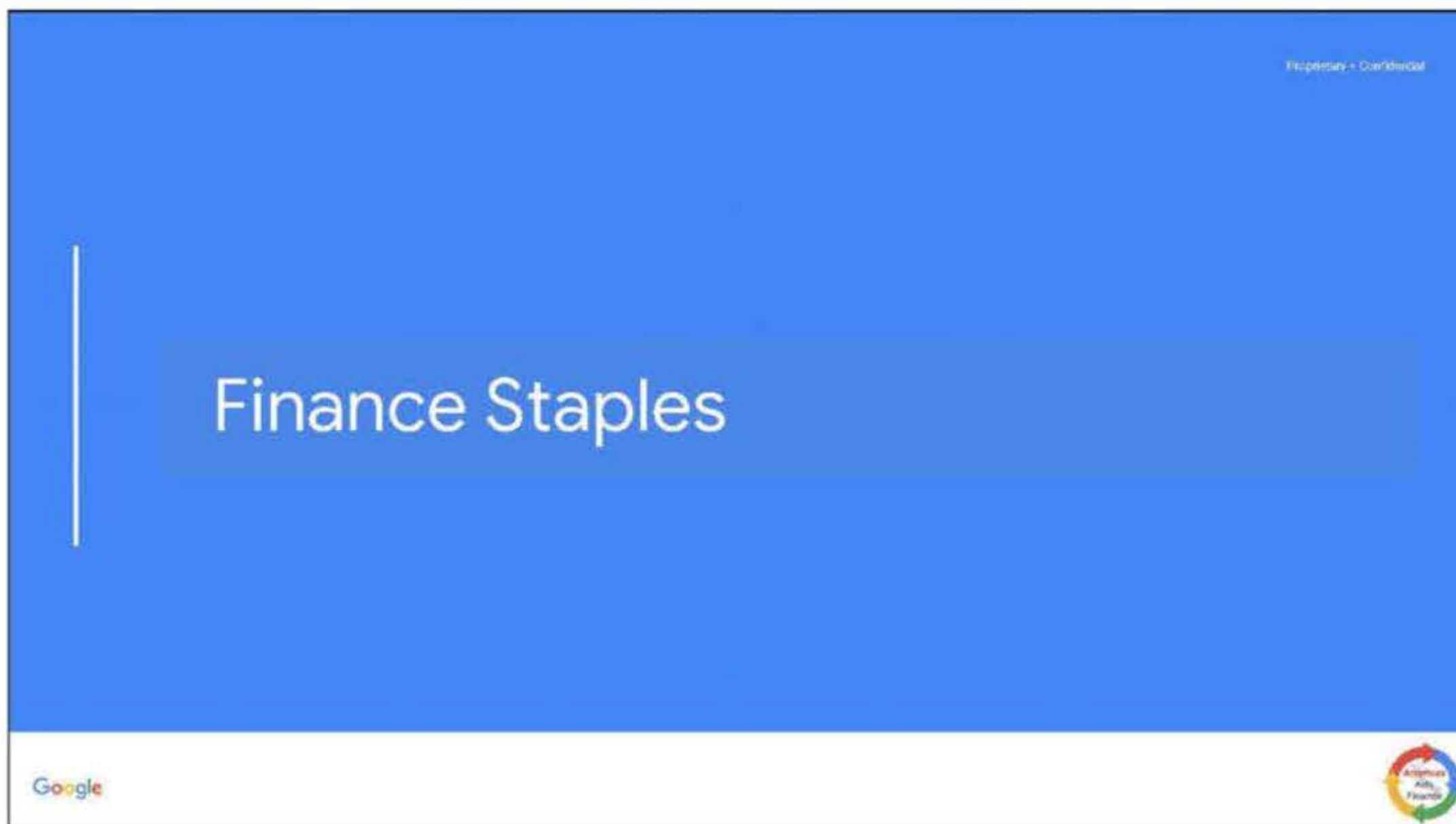
Update Types:

- **Prepare:** Requires data review ahead of Revenue Call to prepare for questions or discussion
- **Inform:** Meant to drive awareness of progress, upcoming initiatives/programs, or asks for the teams

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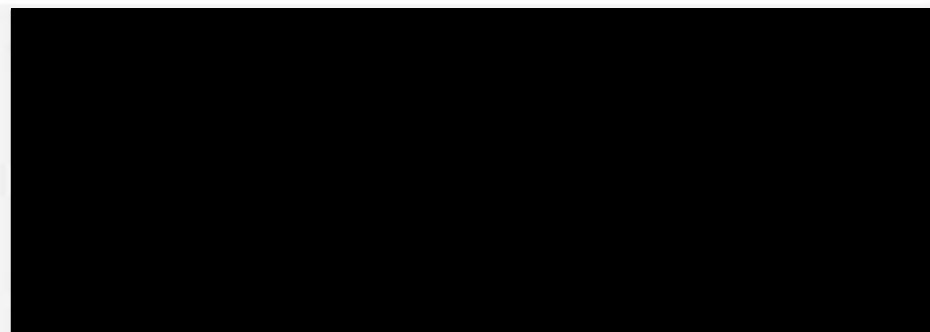
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Finance Week 9/21 at a Glance

	Agency Performance				
	EOQx	EOQ %	QTD Y/Y	EOQ w/w	Growth w/w
US Agency					
Search					
YouTube					
DVA					



	US LCS Performance				
	EOQx	EOQ %	QTD Y/Y	EOQ w/w	Growth w/w
US LCS					
Search					
YouTube					
DVA					
CG&E					
IS					
MCS					
SDS					

Google

Comment from Evan - include SSG? Call out for GCS?

US Agency ended the week at [REDACTED] We saw givebacks mostly from [REDACTED] along with deceleration in growth rate [REDACTED]

	Growth			Performance				
	How much \$ are we adding to the business?			Did we hit target?				
Agency Pod	QTD Y/Y	7-day Y/Y	QTD Y/Y SSG	Weekly Perf %	EOQx W/W	EOQx	EOQx %	EOQx +/-
Independents	[REDACTED]							
Dentsu								
Publicis								
Omnicom								
Interpublic								
WPP								
Total US								

Comment from Evan - [REDACTED]

Product: Givebacks primarily came from YouTube [REDACTED] which shed about [REDACTED]								
	US LCS Agency				US LCS Direct/Non-NAL			
	EOQx	EOQx %	QTD Y/Y	7-Day Delta	EOQx	EOQx %	QTD Y/Y	7Day Delta
Search	[REDACTED]							
CT Search								
Mobile Search								
Search App Promo								
YouTube								
A&C								
Action								
YouTube App Promo								
DVA								
Display								
Video								
DVA App Promo								

US LCS YouTube + Video is at

Missed target for the week is driven by

US LCS YouTube + Video							
	Perf	EOQ				Growth	
Product Group	Weekly Perf %	EOQx	EOQx %	EOQx +/-	EOQx W/W	QTD Y/Y	7 day Y/Y
US LCS YT + Video							
A&C							
Action							
YouTube App Promo							
Video							

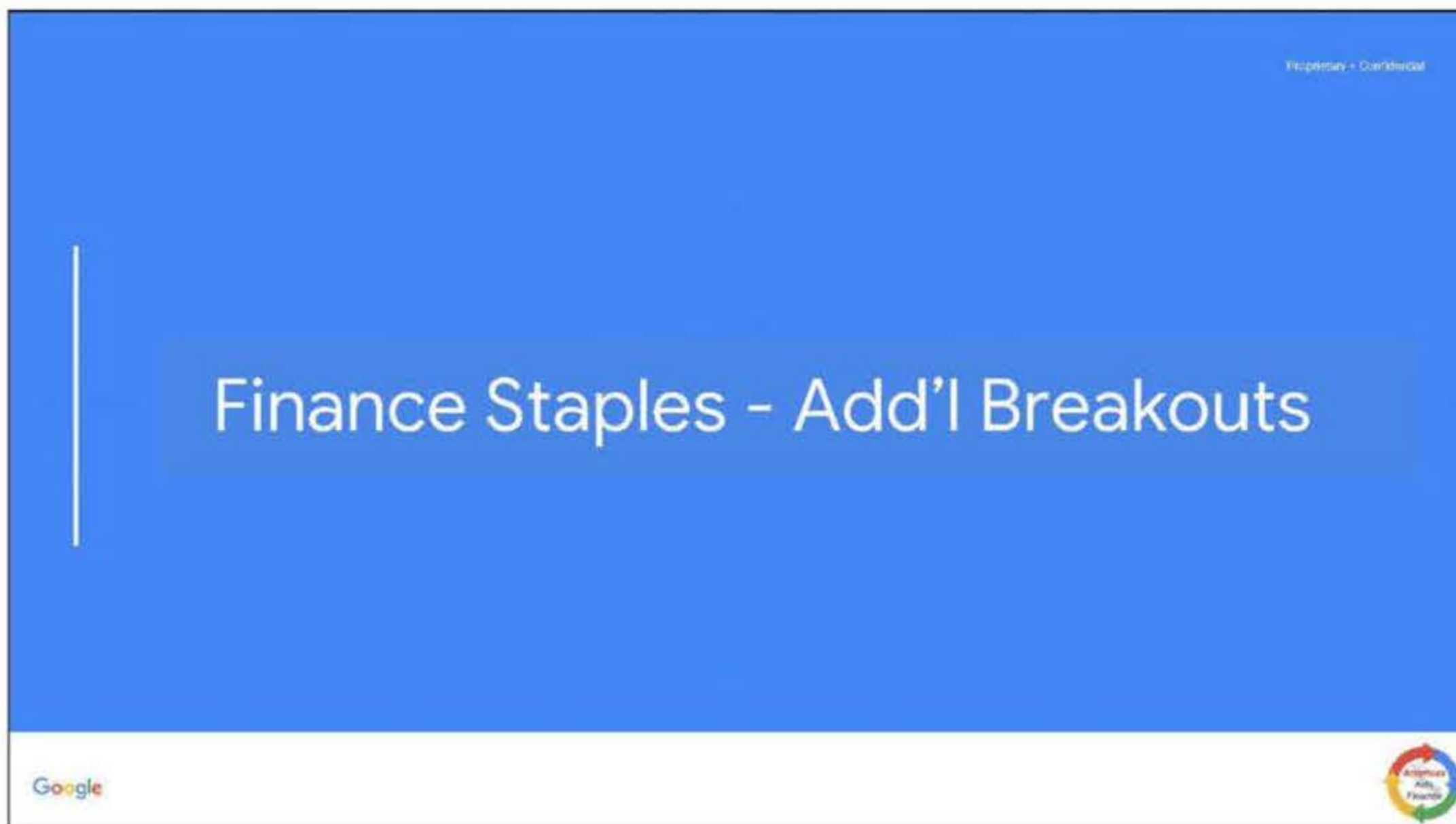
US Agency YouTube + DVA by Pod					
	EOQ			Growth	
Agency Pod Group	EOQx	EOQx %	EOQx W/W	QTD Y/Y	7 day Y/Y
YouTube + DVA					
Independents					
Dentsu					
Publicis					
Omnicom					
Interpublic					
WPP					

Q3'22 MQC: Our current outlook is [REDACTED] With a week left in the quarter, we see some upside but expect to miss our call by [REDACTED] ppts.

	8/12 "AMG Call"	EOQx 9/21	"Call" vs EOQx	Revised "AMG Call"	"Revised Call" vs EOQx
CG&E	[REDACTED]				
IS					
MCS					
SDS					
CA					
BR					
SPLA					
LCS					
LCS EOQ %					
GCS					
LCS + GCS					
LCS + GCS EOQ %					
Agency					



IDA Policy
 lower: 2ppts+ of outlook lower than AMG
 within: within 2ppts of outlook range
 higher: 2ppts+ of outlook higher than AMG



Top Whales at a Glance (as of 9/21)

For more details on your whales see:

[go/indy-spsa-rev](#) | [go/entia-spsa-rev](#)
[go/bkls-spsa-rev](#) | [go/anncom-cspsa-rev](#)
[go/psa-spsa-rev](#) | [go/wpp-spsa-rev](#)

Parent	Assoc. HoldCo	EOQx (\$M)	EOQx +/- (\$M)	EOQx W/W	QTD Y/Y	US LCS QTD Y/Y Growth Contr.	7 day Y/Y
Meta	(PUB, Indy)						
Comcast Corporation	(WPP, PUB, Indy)						
The Walt Disney Company	(OMC)						
Apple	(OMC)						
Williams-Sonoma Group	(Indy)						
Microsoft	(DAN)						
Samsung Group	(PUB)						
Amazon Corp.	(IPG, Indy)						
Etsy	(Indy)						
AT&T	(OMC, Indy)						
Gap Inc.	(Indy)						
Stellantis N.V.	(PUB)						
Charter Communications	(DAN)						
L'Oreal	(WPP)						
Hilton Worldwide Group	(DAN)						
Top 15	(All)						
All Whales	(All)						
Rest of US Agency	(All)						
Direct/Non-NAL	(None)						
US LCS	(All)						

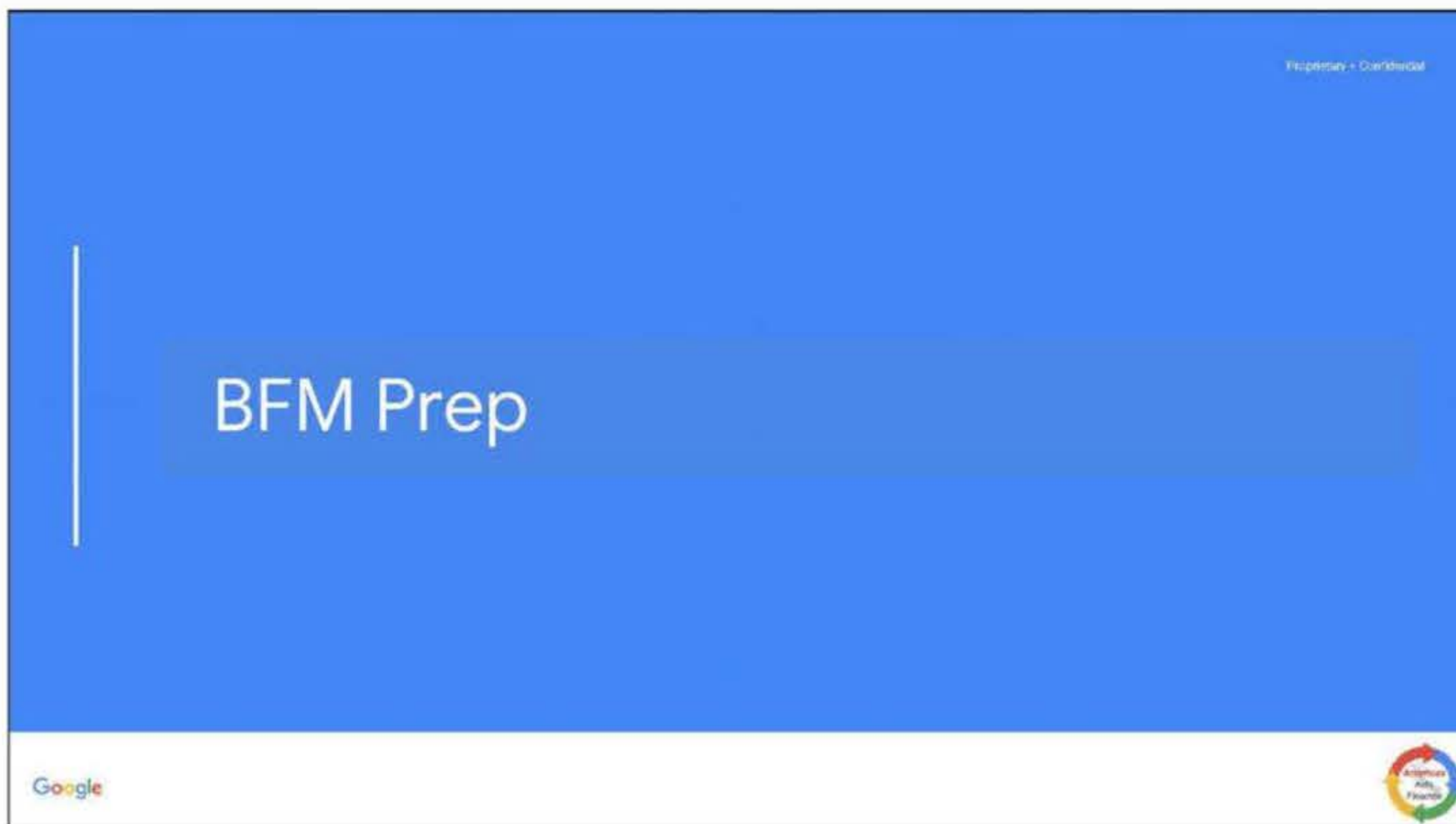
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AMG Verticals at a Glance (as of EOQ)

Sector	Vertical	Agency EOQx +/- (\$M)	Direct/NN EOQx +/- (\$M)	Agency QTD Y/Y Contr.	Direct/NN QTD Y/Y Contr.
CG&E	Automotive 1				
	Automotive 2				
	FBR				
	Gov & Advocacy				
	HPC				
	M&E				
	Technology - CE				
MCS	BA&D				
	B&IM				
	Retail - Amazon				
	Retail - PP				
	Retail - BB				
	Retail - Specialty				

Sector	Vertical	Agency EOQx +/- (\$M)	Direct/NN EOQx +/- (\$M)	Agency QTD Y/Y Contr.	Direct/NN QTD Y/Y Contr.
IS					
SDS					

Google



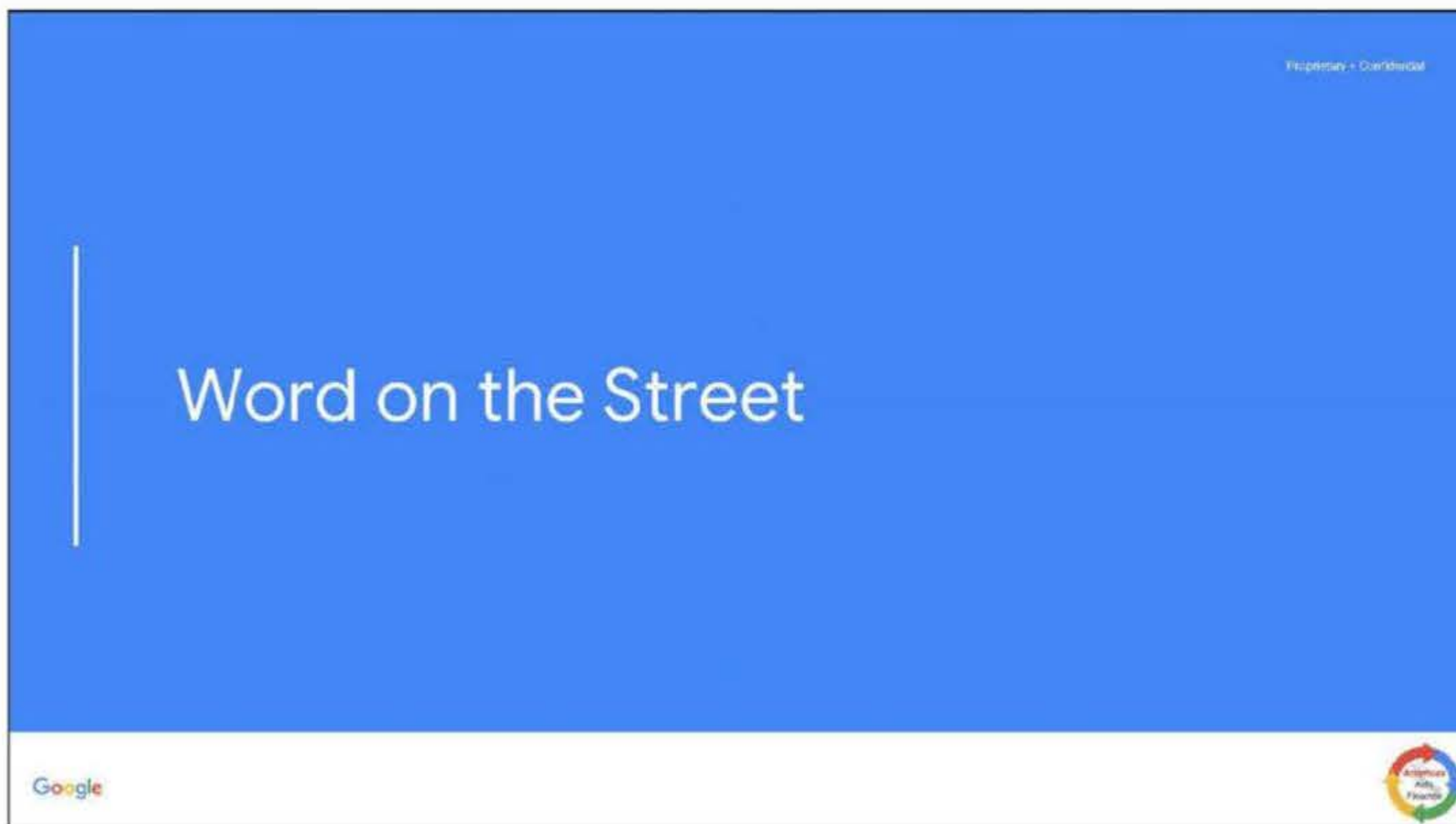
Weekly BFM Insights - App BFMs					
BFM		HAL	Direct	Independents	
ACI Excellence	BFM Value				
	90d change				
	Strongest Adopter				
	Largest Opportunity				
Google Analytics for Firebase	BFM Value				
	90d change				
	Strongest Adopter				
	Largest Opportunity				
Appify Breadth	BFM Value				
	90d change				
	Q4 2022 Target				
	Strongest Adopter				
	Largest Opportunity				
ACe Depth	BFM Value				
	90d change				
	Strongest Adopter				
	Largest Opportunity				

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



[REDACTED]

P [REDACTED] [REDACTED] [REDACTED] [REDACTED]
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cTV Revenue Growth Contribution by Pod

